

Database Design for CA Practice Management Tool

1. Users Table (CAs)

- user_id (PK, UUID)
- name (VARCHAR)
- email (VARCHAR, unique)
- phone (VARCHAR)
- password_hash (TEXT)
- created_at (TIMESTAMP)

2. Clients Table

- client_id (PK, UUID)
- user_id (FK -> Users.user_id)
- client_name (VARCHAR)
- client_email (VARCHAR)
- client_phone (VARCHAR)
- business_name (VARCHAR)
- gst_number (VARCHAR)
- pan_number (VARCHAR)
- client_type (ENUM: Individual, Business)
- created_at (TIMESTAMP)

3. Tasks Table (e.g., GST Filing, ITR, etc.)

- task_id (PK, UUID)
- client_id (FK -> Clients.client_id)
- task_type (ENUM: GST, ITR, ROC, TDS, Other)
- due_date (DATE)
- status (ENUM: Pending, In Progress, Completed, Failed)
- remarks (TEXT)
- assigned_to (VARCHAR)
- created_at (TIMESTAMP)

4. Documents Table

- doc_id (PK, UUID)

- client_id (FK -> Clients.client_id)
- uploaded_by (ENUM: CA, Client)
- doc_name (VARCHAR)
- doc_type (ENUM: PAN, GST Return, Balance Sheet, Others)
- file_path (TEXT)
- uploaded_at (TIMESTAMP)

5. Payments Table

- payment_id (PK, UUID)
- client_id (FK -> Clients.client_id)
- amount (DECIMAL)
- payment_status (ENUM: Pending, Paid, Overdue)
- due_date (DATE)
- paid_date (DATE)
- remarks (TEXT)

6. Reminders Table

- reminder_id (PK, UUID)
- task_id (FK -> Tasks.task_id)
- reminder_date (DATE)
- method (ENUM: Email, WhatsApp, SMS)
- status (ENUM: Sent, Failed, Pending)